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# TRANSFER ON DEATH (TOD) REGISTRATION FORM

## A GENERAL INFORMATION

Transfer on death is a form of account registration which allows an individual who is sole owner of a security or one of multiple owners in joint tenancy to register the security as a beneficiary registration. A beneficiary registration provides that upon the death of the owner, ownership of the security will transfer to a designated beneficiary without going through any probate or testamentary action. A beneficiary may be cancelled or changed by the owner(s) without the consent of the beneficiary. Please note that under the transfer on death with joint tenants, if one tenant is deceased, all shares becomes the surviving tenant's. Therefore, the surviving tenant will need to re-register the account to reflect a new Transfer on Death beneficiary.

## B DESIGNATION

Complete this form to designate your account to be registered for Transfer on Death (TOD) to a beneficiary. **NOTE:** For a *new* account, complete Sections 1 and 2. If you are changing registration for an *existing* account, complete Sections 1 and 3 and obtain a signature guarantee.

**Section 1: Beneficiary Designation:** *(This information will be part of the legal registration and will appear on statements.)*

_____	_____
Name of Beneficiary	Date of Birth
_____	_____
Street Address	City /State/Zip
_____	_____
Social Security Number	Relationship to Account Owner(s)
_____	_____
Account Owner's Name	Millennium Account No.

**Section 2: New Account Registration:** *(Complete and return this form with your Custody Agreement.)*

_____	_____
Account Owner's Name	Account Owner's Social Security Number
_____	_____
Joint Account Owner's Name	Joint Account Owner's Social Security Number
_____	_____
Street Address	City/State/Zip

**Section 3: Owner Information:** *(Complete this section to change an existing registration. Please note that the signatures must be signature guaranteed.)*

_____	_____
Account Owner's Name	Account Owner's Social Security Number
_____	_____
Joint Account Owner's Name	Joint Account Owner's Social Security Number
_____	_____
Street Address	<p align="center"><b>[Medallion Signature Guarantee Stamp Here]</b></p> <p><i>A Medallion Signature Guarantee may be obtained from an authorized officer at a brokerage firm, bank or other financial institution. Certification by a notary public is not a substitute for a signature guarantee.</i></p>
_____	
City/State/Zip	
_____	
Account Number	
_____	
Present Owner's Signature <i>(Exactly as registered)</i>	
_____	
Present Joint Owner's Signature <i>(Exactly as registered)</i>	

